



Philanthropic Coordinator

Position: *Regular, Fulltime, Nonexempt*
Department: *Advancement*
Reports to: *Senior Director, Philanthropic Services*
Supervises: *NA*
Date Revised: *January 2023*

Summary: The Philanthropic Coordinator provides high-level administrative and technical support to the Philanthropic Services team to provide outstanding donor and fund services as well as event experiences that align with the mission of the Foundation. This role serves as the lead administrator for our CRM Software and Integrated Philanthropic databases (iPhi and Salesforce).

Responsibilities and Expected Outcomes:

- Provide proactive and comprehensive administrative support to the Philanthropic Services team to anticipate their needs and carry out critical team activities.
 - Assist with the scheduling and coordination of meetings, events, and appointments.
 - Working with staff and the community to create a welcoming, inclusive environment for TCF guests.
 - Create customized fund and stewardship reports and professional looking presentations for prospective donors.
 - Prepare handbooks, supporting documents and gifts to newly established donors.
 - Oversee the distribution process of the quarterly donor statements.
 - Assist the team in the creation and dissemination of e-newsletters.
 - Prepare organizational fund brochures and related marketing tools.
 - Provide timely responses to internal and external inquiries.
 - Organize files, databases, contact lists, and other department records to ensure data integrity, accuracy, and up-to-date information.
 - Create or otherwise provide technology-based solutions to problems.
 - Serve as point person for data management and reporting projects.
 - Prepare nonprofit research that aligns with donors' philanthropic priorities as needed.
- Serve as lead administrator for iPhi and Salesforce databases and online donor services, including the donor portal, donor help desk, and advancement hotline for the Philanthropic Services team.
 - Oversee the testing and implementation of new features that improve these technologies for internal and external partners.
 - Investigate system issues as they arise and work cross-departmentally to determine solutions.
 - Determine best methods to collect and share data.
 - Track and share progress on various concurrent technology projects.
 - Communicate about issues or support needed to Stellar Technologies (database technology provider).



- Assist in the distribution of information regarding technology projects to colleagues and donors as requested.
- Regularly review Stellar Technologies release notes and lead the implementation of new system features as applicable.
- Utilize technology to communicate foundation priorities to donors and partners.
- Provide donor and fund partner perspective in ITS meetings regarding partnership with Stellar Technologies, iPhi upgrades, Salesforce, and testing and implementation of new technologies that impact donors.
- Provide technical support to donors and organizational fund partners navigating the Portal and other philanthropic technology.
- Serve as the lead support to Events Manager for Philanthropic Services events.
- Collaborate with cross-disciplinary teams and serve as a responsive services team member to respond to inquiries from current donors, prospective donors, organizations, and professional advisors to resolve issues, provide information, and serve as a link to Foundation resources.
- Serve as primary relationship manager for assigned donors and funds to engage their philanthropic interests and handle their responsive needs.
- Serve as point person in preparing and distributing assigned Supporting Organizations' board docket and pre-docket materials, scheduling meetings and site visits, preparing minutes, and coordinating communication with other departments.
- Annually prepare and distribute materials for multiple committee-advised funds.
- Coordinate and supervise administrative student workers for Advancement team in partnership with Building Operations and Guest Services team.
- Update and maintain the content for the philanthropic services responsive handbook to provide a streamlined experience for team members to deliver the highest quality of services for donors.
- Other related duties and assignments as assigned.

Essential Qualifications, Credentials and Technical Skills required:

- High school diploma or equivalent and three to five years of experience working in a customer service, administrative and/or development environment. Associate's or bachelor's degree in a related field welcome.
- Exceptional interpersonal, organizational, grammatical, and proofing skills.
- Demonstrated customer service orientation and an ability to interact confidently and effectively with people of diverse cultural and socio-economic backgrounds.
- Commitment to diversity, equity and inclusion across all work.
- Strong critical thinking and verbal and written communication skills with a proactive, solution-based focus to addressing problems or issues.
- Ability to respond sensitively and patiently to staff, donor and community inquiries in a timely manner and the ability to handle sensitive information and maintain confidences regarding donor, prospect, and financial data.
- Demonstrated detail orientation, flexibility, and ability to coordinate several projects simultaneously and anticipate problems as they arise.



- Ability to take a proactive role in team efforts, promote cooperation and collaboration between team members and encourage open communication in multidisciplinary teams.
- Proficiency in Microsoft Word, Excel, PowerPoint, Outlook, Office 365 applications, internet research, database input/ maintenance and the ability and desire to continually learn new technology as appropriate.

Other highly desirable qualifications include familiarity with the Cleveland business and nonprofit community, an understanding of philanthropic fundraising, and proficiency with donor databases (Salesforce or other).

OUR COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION:

The Cleveland Foundation exists to enhance the quality of life for all citizens of Greater Cleveland. The ability to carry out our mission and to foster our commitment to diversity, equity and inclusion can best be pursued if our workforce, grantees, donors, partners, and governing body are inclusive of individuals of diverse backgrounds, beliefs, and perspectives.

We believe that diversity encompasses, but is not limited to, age, color, education, ethnicity, family or marital status, gender, gender identity or expression, language, national origin, physical and mental abilities or characteristics, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and/or other characteristics that make an individual unique. The Cleveland Foundation is committed to equal employment opportunities for all.

PAY AND BENEFITS:

Based on the foundation's compensation program, estimated annual salary for this position may be anywhere between \$45,000 and 58,000, based on the academic, professional and community experiences and credentials of a candidate.

The foundation offers an exceptional benefits package including medical, dental, vision, identity theft, and life and disability coverage, a comprehensive wellness program, an employee assistance program, a fully vested 403(b) retirement plan, ten paid holidays and, for exempt positions, 10 days of vacation and 12 sick days, prorated the first year of service based on date of hire.

TO APPLY:

If you are interested in applying for this position, please submit your resume and cover as soon as possible via this link: Apply [here](#). This posting will remain active until the position is filled. We regret that we cannot respond personally to each applicant.

Note: Hours worked will be largely remote, until we move into our new headquarters building early in 2023, where our flexible workplace policy provides for one day of remote work per week. The Cleveland Foundation requires all employees to be fully vaccinated against COVID-19 and provide valid proof of vaccination unless a documented medical or religious exemption is approved. All information provided will be kept strictly confidential.